A5690.1.2-F

INTERNATIONAL AIRLINE PASSENGERS ASSOCIATION (IAPA)

Membership Survey Results - 1984/1985

****

INTERNATIONAL SURVEY RESULTS

****

Published by
International Airline Passengers Association
(Group Publications) Ltd.

DALLAS . LONDON . HONG KONG . PANAMA . ROTTERDAM
BERLIN . PORTUGAL

FOREWORD

This report presents a summary of the data analysis of the 1984 IAPA membership survey. In general, members are high frequency air travellers who make trips for both business and pleasure. they are predominantly male, highly educated, of a professional or business status, and in the middle to high income brackets.

Since the civil aviation industry in the North American continent is markedly different from that in other parts of the world, two questionnaires were compiled; the first was sent to members residing in North America, Canada and Mexico, the second to members in all other parts of the world. The results from the two questionnaires are presented in separated booklets.

Questionnaires were mailed to over 93,000 IAPA members. As of November 1984, 10,059 of the North American questionnaires and 9,072 of the international questionnaires had been returned giving an overall response rate of 20%. Approximately 44% of IAPA membership resides in the Americas.

TABLE OF CONTENTS

INTERNATIONAL SURVEY RESULTS

GENERAL FINDINGS

Respondent demographics..... 1
Demographics of respondents' businesses..... 7

AIRLINE EXPERIENCES

Airlines flown over the past two years..... 9
In-flight service..... 15
Ground service..... 17
Most preferred airlines overall..... 19
Airlines that would be avoided..... 23
Round trip frequency during past two years..... 30
Class flown most often..... 32
Choosing a flight..... 33
Attitudes toward airfares..... 39

AIRCRAFT PREFERENCES

Aircraft flown on during past two years..... 40
Important factors in preference of an aircraft 41
Most preferred aircraft..... 42
Aircraft that would be avoided..... 43
Perceptions of commercial aircraft manufacturers.... 44
Smoking on the aircraft..... 45

AIRPORT FACILITIES

Airports flown into during the past two years..... 46
Evaluations of airport services and facilities..... 51
Best liked airport overall..... 53
Least liked airport overall..... 55
Attitudes toward VIP Club lounges..... 60
Purchasing duty-free goods..... 61

TABLE OF CONTENTS (Continued)

HOTEL FACILITIES

Hotel/Motel usage during the past two years..... 62
Hotel prices..... 68
Selection of hotel accommodation..... 69
Type of hotel accommodation used..... 70
Overall evaluations of hotel chains..... 72
Hotel rooms for smokers and non-smokers..... 77

CAR RENTAL COMPANIES

Rental car usage during the past two years..... 78
Selection of a car rental company..... 81
Evaluations of car rental agencies..... 83
Rental cars for smokers and non-smokers..... 88

****

INTERNATIONAL SURVEY RESULTS

****

****

GENERAL FINDINGS

****

This section of the report presents general findings of the basic demographics of the 1984 IAPA international respondents and their businesses. Where appropriate, comparisons with the 1981 and 1979 survey results are drawn. There were a total of 9,072 respondents to this survey questionnaire.

RESPONDENT DEMOGRAPHICS

Country of Residence

Over half of the 1984 international survey respondents reside in a European country. The total spectrum of countries represented in this study is presented below.

COUNTRY OF RESIDENCE

	1984	1981
Europe	56.3%	65.1%
United Kingdom	41.0	
France	3.7	
Germany	7.1	
Other	4.5	
Middle East/Turkey/ Indian Sub-continent	14.2	10.6
Australia/Asia/Indonesia	11.9	10.3
Central/South America (including Mexico)	10.7	7.7
Africa	4.8	4.7
Canada, U.S.A.	2.0	1.6

Language

Almost half of this year's survey participants claim English as their native language, and most others primarily speak a European language.

NATIVE LANGUAGE

	1984
English	45.0
German	8.0
Spanish	7.0
French	4.7
Other European Language	17.3
Chinese/other Asian language	6.2
An Arabic language	4.7
Other	7.0

Age

The average age for persons participating in the 1984 survey is 44.2 years, which breaks down as follows:

AGE

1984			1981	1979
Under 20	0.1%	Under 18	0.1%	0.3%
20 - 24	1.1	18 - 21	0.5	0.6
25 - 29	6.4	22 - 25	3.3	3.1
30 - 34	12.1	26 - 35	26.9	26.8
35 - 39	18.4	36 - 45	35.3	34.4
40 - 44	17.9	46 - 55	23.9	24.6
45 - 49	15.2	56 - 65	8.9	9.4
50 - 54	12.7	65+	1.1	0.8
55 - 59	8.5			
60 - 64	5.2			
65 +	2.4			
Average	44.2 years			

Sex

As has been found in previous surveys, almost all the respondents are male.

SEX

	1984	1981	1979
Male	97.0%	97.1%	98.3%
Female	3.0%	2.9%	1.7%

Marital Status

The vast majority of the participants in this year's international survey are married.

MARITAL STATUS
1984

Married	81.4%
Unmarried	18.6%

Education

Similar to previous years' findings, the educational status of the majority of respondents shows no substantial change since the last survey was conducted. In addition, half of the 1984 respondents have pursued graduate studies.

EDUCATION

	1984	1981	1979
1 - 6 years	1.0	0.4	1.1
7 - 9 years	2.8	2.4	3.2
10 - 12 years	19.1	18.4	23.6
1 - 2 years college	7.6	12.6	13.7
3 - 4 years college	18.6	23.6	13.7
Post-graduate	50.8	33.8	26.2

Occupation
==========

As in past years, the individuals who responded to the 1984 International survey are employed in executive, managerial or professional capacities.

OCCUPATION

	1984	1981	1979
Executive manager	56.7%	51.2%	56.7%
Professional	16.9	18.2	36.3
Teacher/professor	1.6	2.3	---
Sales (not retail)	3.8	6.9	1.8
Technical	5.0	6.4	---
Craftsman	0.4	0.3	1.4
Clerical	0.6	0.7	0.2
Government/military	2.0	2.9	---
Retired	1.2	0.7	0.2
Self-employed	8.3	9.3	---
Student	0.3	0.5	---
Homemaker	0.3	0.5	---
Other	2.9	0.1	3.4

Income

The average annual household income for a 1984 international survey respondent is $64,500 versus $58,200 in 1981 and $43,100 in 1979.

ANNUAL HOUSEHOLD INCOME

	1984		1981	1979
Under $20,000	4.3%	Under $20,000	4.7%	12.5%
$20,000 - $34,999	18.4	$20,000 - $35,000	20.0	36.2
$35,000 - $49,999	24.1	$35,001 - $50,000	27.0	24.4
$50,000 - $64,999	20.8	$50,001 - $75,000	24.0	16.3
$65,000 - $79,999	10.9	$75,001 - $100,000	1.9	5.3
$80,000 - $99,999	7.8	$101,001 - $150,000	6.6	5.3
$100,000 - $149,000	5.9	Over 150,000	5.8	---
$150,000 +	5.9			
Average	$64,500	Average	$58,200	$43,100
Percentage change since last study	+10.6%	Percentage change since last study	+35.0%	--

Two thirds (65%) of the 1984 respondents report that only one person contributes to the household income, while the remaining households (35%) have two or more individuals contributing to income. These statistics indicate slightly increasing numbers of households with more than one income contributor since 1979.

NUMBER OF FAMILY MEMBERS CONTRIBUTING TO HOUSEHOLD INCOME

	1984	1981	1979
1	65.0%	70.0%	73.9%
2	28.7	26.0	23.6
3+	6.3	4.0	2.5

PROFILE OF RESPONDENTS' BUSINESSES

Category of Business

The 1984 International survey respondents are employed in a wide diversity of industries:

CATEGORY OF BUSINESS

Manufacturing	19.7%
Mining/Oil/Gas	8.3
Professions	8.0
Business services	7.8
Construction	6.3
Wholesale trade	5.6
Finance	4.7
Transportation	4.6
Communications	4.3
Other services	3.6
Insurance	3.1
Government	3.0
Agriculture	2.6
Retail trade	1.7
Real estate	0.7
Other	16.2

Size of respondents' firms

As with the 1981 survey, almost half of this year's respondents are employed in relatively small firms, consisting of fewer than 100 employees.

SIZE OF RESPONDENTS' FIRMS

	1984	1981
1-99	45.5%	40.9%
100-249	12.0	11.3
250-499	8.9	9.4
500-999	7.6	7.7
1,000-4,999	12.7	13.5
5,000+	13.3	17.2

****

AIRLINE EXPERIENCES

****

AIRLINES FLOWN DURING PAST TWO YEARS
****

From a list of commercial airlines, respondents indicated on which ones they had flown during the past two years. As in the 1981 survey, the international carriers most commonly flown by at least half of all international survey respondents this year are:

* British Airways (73.9%)
* Lufthansa (53.4%)
* Air France (51.8%)
* Swissair (51.6%)

Three carriers - British Airways, Air France and American - have fallen off in reported usage (by at least 5%) since 1981. (See Table 15, page 12 details).

According to country of residence, the most commonly flown international carriers (flown by at least half of the respondents) are:

United Kingdom

British Airways (95.7%)
British Caledonian Airways (56.9%)
Air France (53.7%)
KLM (49.8%)

Middle East

British Airways (73.9%)
Saudi Arabian Airlines (59.2%)
Gulf Air (56.7%)

Germany

Lufthansa (93.8%)
British Airways (76.0%)
Swissair (70.1%)
Pan Am (63.9%)
Air France (57.8%)

France

Air France (95.9%)
British Airways (75.2%)
Swissair (67.7%)
TWA (51.9%)

Asia

Singapore Airlines (79.5%)

Cathay Pacific Airways (75.1%)

JAL (56.5%)

British Airways (56.3%)

Thai Airways International (56.3%)

Malaysian Airline System (52.5%)

Pan Am (50.9%)

Table 15

AIRLINES FLOWN DURING PAST TWO YEARS

	1984	1981
British Airways	* 73.9%	81.8%
Lufthansa	53.4	57.1
Air France	* 51.8	60.2
Swissair	51.6	51.8
KLM	47.7	50.7
Pan Am	45.1	44.7
Eastern	37.6	36.9
Alitalia	32.9	37.1
TWA	32.2	36.0
SAS - Scandinavian Airlines	32.0	35.9
Singapore Airlines	31.1	29.7
British Caledonian Airways	30.5	34.8
American	* 29.7	36.5
United	25.8	29.3
Cathay Pacific Airways	25.6	23.0
Delta	25.5	27.9
Iberia	25.3	25.5
Sabena	21.9	24.5
Thai Airways International	19.3	17.6
JAL (Japan Air Lines)	18.9	19.1
Gulf Air	17.7	17.1
Austrian Airlines	16.2	17.4
Saudi Arabian Airlines	16.1	14.7
Air Canada	15.4	18.8

* = Decrease of at least 5% in reported usage.

Table 15 (Continued)

	1984	1981
Olympic Airways	14.8	14.5
British Midland Airways	13.6	12.3
Northwest	13.4	13.7
Qantas	13.2	14.8
Finnair	13.1	13.8
Malaysian Airline Systems	12.8	11.8
Dan Air	12.2	13.6
Philippine Airlines	11.1	9.8
Air UK	10.8	13.3
Varig	10.5	11.1
Air-India	10.4	11.3
Egypt Air	10.3	9.3
Air Florida	10.2	--
Aer Lingus	9.9	13.7
Continental	9.8	11.6
Western	9.6	13.7
China Airlines	9.5	9.2
UTA French Airlines	9.4	10.5
Garuda Indonesian Airline	9.2	8.5
Alia Royal Jordanian Airline	9.1	8.1
TAP	9.1	10.2
South African Airways	8.3	9.4
Conair Airways	8.3	8.6
Indian Airlines	7.7	7.0
Ansett Airlines of Australia	7.5	7.7
Cyprus Airways	7.3	6.6
Avianca	7.3	6.6

Table 15 (Continued)

	1984	1981
Britannia Airways	6.6	7.5
Canadian Pacific (CP Air)	6.5	6.7
Air New Zealand	6.2	7.1
Middle East Airlines	5.7	8.7
Aeromexico	5.6	7.8
Pakistan International Airlines	5.6	5.8
Kenya Airways	5.5	6.4
Aerolineas Argentinas	5.4	7.9
Aeroflot Soviet Airlines	5.2	6.5
Viasa	5.0	5.7
Air Lanka	5.0	
Mexicana	4.7	4.8
Nigeria Airways	4.6	4.9
El Al Israel Airlines	4.6	5.7
Air Afrique	4.4	5.9
BWIA International	4.0	3.5
JAI (Yugoslav Airlines)	3.6	4.3
THY (Turkish Airlines)	3.5	2.8
Royal Air Maroc	3.5	4.0
Tunis Air	3.2	3.3
Air Malta	3.2	4.6
Ethiopian Airlines	3.1	3.3
Malev (Hungarian Airlines)	2.9	2.7
Iraqi Airways	2.7	3.2
Air Algeria	2.5	3.2
Air Jamaica	2.5	2.6
LOT (Polish Airlines)	2.3	3.4

Table 15 (Continued)

	1984	1981
People Express	2.3	
Syrian Arab Airlines	2.2	2.1
Brymon Airways	2.1	1.9
Royal Brunei Airlines	2.0	1.5
World Airways	2.0	
Balkan Bulgarian Airlines	2.0	2.2
Libyan Arab Airlines	2.0	2.7
Sudan Airways	1.9	2.6
CSA - Czechoslovak Airline	1.8	2.3
Iran Air	1.6	2.3
Ghana Airways	1.4	2.0
British Island	1.4	3.0
Air Gabon	1.3	1.3
Air Mauritius	1.3	1.6
Caribbean Airways	1.2	1.9
Air Zaire	1.0	1.4
Gibair - Gibraltar Airways	0.6	0.7

IN-FLIGHT SERVICE
****

1984 respondents' opinions as to which airlines provide the best and worst in-flight service vary widely, according to country of residence. However, Swissair, Lufthansa and Singapore Airlines are consistently rated among the best, while British Airways, Pan Am and Alitalia are named as being among the worst relatively frequently.

However there are clear indications that the rating of any particular airline by members is closely related to experience i.e. airline flown.

See page 26 on members ratings on airlines flown.

AIRLINES WITH BEST IN-FLIGHT SERVICE
(Includes airlines with at least 5.0% total mentions)

		Country of Residence				
	Total	United Kingdom	France	Germany	Middle East	Asia
Swissair	(37.9%)	(28.3%)	(51.8%)	(53.1%)	(39.5%)	(21.8%)
Lufthansa	(25.0)	16.4	(31.4)	(66.0)	(20.9)	13.1
Singapore	(25.0)	(20.2)	18.4	(24.7)	(31.2)	(63.6)
British Airways	18.9	(38.4)	9.4	9.3	18.0	7.4
KLM	17.2	17.0	7.3	10.5	(20.4)	6.3
Cathay Pacific	16.1	17.3	12.7	12.7	(20.7)	(50.3)
SAS	15.4	11.3	11.8	15.7	7.6	5.1
Air France	10.6	8.4	(42.2)	8.0	9.4	3.8
Thai Airways	10.6	7.8	9.4	9.3	11.6	(29.6)
British Caledonian	10.5	(26.4)	6.9	4.9	6.1	6.3
JAL	7.3	4.6	6.9	4.6	6.7	(28.3)
TWA	6.6	8.9	15.1	6.5	6.3	1.1
Varig	6.3	3.6	4.5	4.3	0.7	0.6
Pan Am	5.3	4.2	6.5	6.2	5.6	5.7
Qantas Airways	5.2	5.4	1.2	0.9	4.5	8.9

( ) = 20% and greater.

AIRLINES WITH WORST IN-FLIGHT SERVICE
(Includes airlines with at least 5.0% total mentions)

	Total	Country of Residence: United Kingdom	France	Germany [1]	Middle East	Asia [2]
British Airways	(21.8%)	(27.0%)	(22.9%)	(20.9%)	(25.7%)	(22.3)
Pan Am	(17.6)	(16.0)	(13.0)	(27.0)	(11.6)	(25.8)
Alitalia	(13.1)	(12.7)	(15.2)	(13.8)	(10.2)	6.3
Iberia	8.7	8.1	(13.9)	9.2	4.9	2.6
Air France	8.6	(10.9)	(17.3)	9.2	8.9	7.2
Saudi Arabian	6.6	6.2	3.5	4.3	(24.5)	2.3
Sabena	6.4	7.1	6.9	5.0	3.0	3.3
Eastern	6.3	4.0	6.1	7.4	3.0	4.4
Egyptair	6.2	5.5	8.7	6.0	5.9	4.2

( ) = 10% and greater

1 Lufthansa (11.0%)

2 Garuda Indonesian Airways (17.7%); China Airlines (13.5%); Northwest (12.6%)

GROUND SERVICE
****

As with in-flight service, there is a wide disparity of opinion as to which airlines offer the best and worst ground service. Swissair and Lufthansa receive significant numbers of "best" ratings in most countries under consideration, while British Airways and Alitalia receive relatively high numbers of mentions as airlines providing the worst ground service. More specifically, the results from this question are as follows:

AIRLINES WITH BEST GROUND SERVICE
(Includes airlines with at least 5.0% total mentions)

		Country of Residence				
	Total	United Kingdom	France	Germany	Middle East	Asia
Swissair	(32.7%)	(21.0%)	(47.2%)	(49.0%)	(32.6%)	18.7%
Lufthansa	(25.3)	16.2	(28.2)	(69.9)	(20.3)	15.2
KLM	9.5	19.3	11.6	12.6	(21.1)	9.4
British Airways	18.2	(37.7)	7.9	6.3	(22.8)	8.4
Singapore	17.0	12.6	9.3	15.6	(20.1)	(49.4)
SAS	13.4	9.0	9.7	13.6	6.7	5.2
Cathay Pacific	9.4	10.1	3.7	4.3	10.7	(40.7)
British Caledonian	8.0	(20.3)	6.0	3.3	5.4	5.6
TWA	7.9	10.5	(22.2)	5.3	8.8	2.1
Pan Am	7.2	6.1	6.0	6.6	9.1	7.3
Air France	7.0	4.7	(37.0)	4.6	8.2	3.5
JAL	5.8	3.5	6.0	4.3	5.1	(27.2)
Eastern	5.6	2.1	3.7	2.3	3.8	1.9

( ) = 20% and greater

AIRLINES WITH WORST GROUND SERVICE
(Includes airlines with at least 5.0% total mentions)

		Country of Residence				
	Total	United Kingdom	France	Germany	Middle East 1	Asia 2
British Airways	(18.0%)	(24.5%)	(18.0%)	(20.5%)	(15.2%)	(13.8%)
Alitalia	(14.0)	(13.1)	(19.6)	(14.4)	9.9	4.4
Pan Am	9.8	9.0	7.9	(16.7)	6.2	(11.7)
Iberia	8.8	8.8	(17.5)	(12.5)	4.0	2.3
Saudi Arabian	8.5	7.7	2.6	7.2	(33.6)	2.6
Air France	7.4	8.3	(17.5)	6.8	7.2	3.7
Egyptair	6.1	5.0	7.9	2.3	(13.3)	3.4

( ) = 10% and greater

1 Gulf Air (12.5%)

2 Garuda Indonesian Airways (19.1%); China Airlines (13.1%); Philippine Airlines (12.0%); Malaysian Airline System (10.2%)

Again members ratings depend very much on experience - see page 26

MOST PREFERRED AIRLINES OVERALL

Respondents were asked to indicate up to four airlines they most prefer to fly. Swissair is the most frequently mentioned carrier, with 40.1 per cent naming it. Both Swissair and Lufthansa receive more frequent mention among first and business class travellers than among persons flying on an economy or discount basis. In total, the following are the most popular carriers (receiving at least 10% mention in the total sample).

MOST PREFERRED AIRLINES
(Up to four choices)

Preferred Airline	Total %	Class flown in			
		1st	Business	Economy	Discount
Swissair	40.1%	47.7%	43.9%	33.0%	33.9%
Lufthansa	27.5	33.2	30.7	23.2	20.4
Singapore Airlines	26.4	31.8	25.6	22.6	31.3
British Airways	21.8	18.7	22.4	23.7	20.0
KLM	20.4	18.3	23.0	18.1	18.0
Cathay Pacific	16.2	19.7	15.5	14.2	19.7
SAS	16.1	7.2	25.5	9.7	11.6
British Caledonian	10.4	11.1	10.6	10.3	9.8

Airline preference varies according to members' country of residence. In each country, the most preferred airlines (mentioned by at least 20% of the residents) are as follows:

MOST PREFERRED AIRLINES
(By country of residence)

United Kingdom	France	Germany	Middle East	Asia
British Airways (42.2%)	Swissair (55.6%)	Lufthansa (64.8%)	Swissair (40.2%)	Singapore (63.3%)
Swissair (29.0)	Air France (44.4)	Swissair (58.3)	Singapore (33.5)	Cathay Pacific (52.3)
British Caledonian (26.0)	Lufthansa (28.4)	Singapore (25.9)	Lufthansa (24.2)	JAL (29.2)
Singapore (20.7)	Singapore (21.0)		British Airways (22.1)	Thai Airways (27.1)
			KLM (22.0)	Swissair (27.1)
			Cathay Pacific (20.1)	

Respondents were also asked to indicate which one airline they most prefer to fly. Results are similar to those obtained in 1981; again, Swissair is the most preferred airline. SAS has gained somewhat in popularity since 1981.

SINGLE MOST PREFERRED AIRLINE

(Top ten)

	1984	1981	1979
Swissair	19.5%	21.7%	14.9%
Singapore Airlines	10.7	13.7	11.7
British Airways	8.5	7.8	18.7
Lufthansa	7.4	8.1	8.6
SAS	7.2	2.7	2.3
Cathay Pacific	5.8	4.2	1.6
KLM	5.7	5.1	3.8
British Caledonian	3.9	3.4	5.3
Air France	2.4	3.0	2.1
Thai Airways	2.3	--	--

In terms of class flown, first class passengers prefer Swissair even more strongly than other respondents and SAS makes an especially strong showing among business class travellers.

SINGLE MOST PREFERRED AIRLINE
(Top ten)

		Class Flown			
Preferred Airline	Total %	First	Business	Economy	Discount
Swissair	19.5%	(24.9%)	19.2%	17.8%	16.1%
Singapore Airlines	10.7	13.4	8.9	9.8	15.1
British Airways	8.5	6.1	8.8	10.0	7.8
Lufthansa	7.4	9.5	7.4	6.9	6.0
SAS	7.2	1.9	(12.7)	3.5	4.7
Cathay Pacific	5.8	6.6	5.3	5.9	7.3
KLM	5.7	4.5	7.2	4.7	5.0
British Caledonian	3.9	4.0	4.1	3.7	4.1
Air France	2.4	2.3	2.3	2.4	2.9
Thai Airways	2.3	0.7	2.6	1.9	3.9

( ) = At least 5.0 above total %

By country of residence the most preferred airline is as follows:

SINGLE MOST PREFERRED AIRLINE
(With 5% or more total mentions)

United Kingdom	France	Germany	Middle East	Asia
British Airways (23.7%)	Swissair (28.9%)	Lufthansa (41.3%)	Swissair (21.2%)	Singapore (29.9%)
Swissair (13.0)	Air France (24.3)	Swissair (21.1)	Singapore (17.1)	Cathay Pacific (22.0)
British Caledonian (11.0)	Singapore (8.4)	Singapore (9.3)	British Airways (7.9)	Swissair (9.0)
Singapore (8.3)	Lufthansa (6.7)		Cathay (7.9)	JAL (7.9)
Cathay Pacific (6.9)	TWA (5.4)		Lufthansa (5.8)	Thai (7.1)
			KLM (5.5)	

AIRLINES THAT WOULD BE AVOIDED

This year, respondents were asked to name up to three airlines that they would avoid. Similar to findings for 1981 and 1979, four airlines come up most frequently:

* British Airways
* Pan Am
* Alitalia
* Aeroflot

More specifically, the top ten ranking airlines to be avoided are as follows:

AIRLINES TO BE AVOIDED
(Top ten)

	1984 (1)	1981 (2)	1979 (2)
British Airways	15.8%	14.6%	23.7%
Pan Am	12.6	8.5	7.2
Alitalia	12.1	6.6	6.7
Aeroflot	11.1	9.9	9.0
Saudi Arabian Airlines	8.1	3.1	3.4
Egypt Air	7.6	2.6	2.5
Iberia	6.9	2.2	3.3
Nigeria Airways	6.0	3.1	3.7
El Al Israel Airlines/ Libyan Arab Airlines	5.8	--	--
Air France	5.6	2.0	2.3

(1) Multiple responses
(2) One response only

No major differences regarding the airlines to be avoided emerge when analysed by class flown. However, members ratings are greatly influenced by airline experiences - see page 25.

By country, the ten airlines that would most often be avoided are as follows:

AIRLINES TO BE AVOIDED
(Top ten)

United Kingdom	France	Germany	Middle East	Asia
British Airways (19.3%)	British Airways (17.9%)	Pan Am (19.2%)	Saudi Arabia (26.6%)	Garuda Indonesian (20.2%)
Pan Am (13.2)	Aeroflot (15.6)	British Airways (17.9)	British Airways (18.1)	British Airways (16.0)
Alitalia (10.9)	Alitalia (12.9)	Aeroflot (16.5)	Egypt Air (17.3)	Pan Am (14.6)
Nigeria Airways (9.7)	Air France (11.2)	Alitalia (13.1)	Pakistan (9.7)	Aeroflot (12.4)
Aeroflot (9.4)	Iberia (10.3)	Iberia (8.6)	Pan Am (9.3)	Air India (11.3)
Saudi Arabian (8.5)	Pan Am (8.9)	Air France (6.5)	Alitalia (9.2)	China Airlines (10.6)
Egypt Air (7.2)	Egypt Air (7.1)	Lufthansa (6.5)	El Al Libyan (7.8)	Philippines (8.5)
Iberia (6.7)	El Al Libyan (5.8)	El Al Libyan (6.2)	Alia-Royal (7.4)	Indian (7.3)
El Al Libyan (6.2)	TWA (5.8)	Pakistan Int'l (5.2)	Syrian Arab (6.3)	Egyptian (5.9)
Air France (6.2)	Saudi Arabian (5.2)	Saudi Arabian (4.8)	Olympic Air (6.1)	Alitalia (5.6)

Ratings of airlines flown over the past two years

An evaluation analysis of airline preference and avoidance in terms of experience of the nominated airline indicates two over-riding trends:

Respondents were unlikely to nominate an airline with which they have not flown as either one they would avoid or prefer.

The likeihood of nominating an airline with which they have flown as one they would avoid or prefer increases with experience of the airline.

So, when airline preference and avoidance is taken in conjunction with actual experience of the airline nominated, the ranking of favourability can change significantly from that shown on the previous pages where experience of an airline is not a criterion.

Table 16 which follows rates airlines with whom 300+ respondents have flown and should be read:

Column 1	% flown % of total respondents claiming to have flown (have experience of) the airline
Columns 2-3	% of those respondents who have flown the airline who would prefer or avoid that airline
Column 4	The net difference between those who have flown and prefer (+) and those who have flown and would avoid (-) an airline. This column provides a preference ranking between airlines.

Thus 31.1% of all respondents have flown Singapore Airlines, of whom 69.7% expressed a preference and 1.6% would avoid: providing a nett +68.1% preference. Further, of the 5.2% of all respondents who have flown Aeroflot, 1.1% expressed a preference and 60.7% would avoid: providing a nett -59.6% avoidance.

Rated in this manner, the preference for Singapore Airlines is statistically "on par" with Swissair; Cathay Pacific is just ahead of Lufthansa and SAS; Thai International and JAL leap into the top ten, closely followed by Air New Zealand. At the bottom of the table Nigeria Airways and Aeroflot emerge as the airlines with the highest avoidance (- negative) rating.

Table 16

RESPONDENTS RATING OF AIRLINES FLOWN OVER THE PAST 2 YEARS

Airline	% Flown 1984	% Based on those airlines flown		
		Preferred	Avoid	Difference
Singapore Airlines	31.1	69.7	1.6	+68.1
Swissair	51.6	69.0	1.0	+68.0
Cathay Pacific	25.6	54.2	1.8	+52.4
SAS	32.0	45.8	2.4	+43.4
Lufthansa	53.4	46.2	3.3	+42.9
Thai International	19.3	40.3	2.0	+38.3
KLM	47.7	37.5	3.0	+34.5
JAL	18.9	32.9	2.8	+30.1
Qantas	13.2	34.4	4.5	+29.9
British Caledonian	30.5	31.1	2.9	+28.2
Air New Zealand	6.2	29.5	2.2	+27.3
South African Airways	8.3	25.8	3.4	+22.4
Austrian Airlines	16.2	17.3	1.8	+15.5
Delta	25.5	16.9	2.2	+14.7
Finnair	13.1	15.6	1.4	+14.2
TWA	32.2	21.9	8.3	+13.6
Malaysian Airline System	12.8	17.9	5.3	+12.6
Canadian Pacific	6.5	14.6	3.6	+11.0
American	29.7	13.0	2.8	+10.2
Air Canada	15.4	13.8	3.9	+ 9.9
British Airways	73.9	28.2	18.8	+ 9.6
Middle East Airlines	5.7	15.6	6.9	+ 8.7

Table 16 (continued)

Airport	% Flown 1984	% Based on those airlines flown		
		Preferred (1 of 4)	Avoid (1 of 3)	Difference
Air France	51.8	17.3	9.1	+ 8.2
Gulf Air	17.7	16.6	8.7	+ 7.9
British Midland Airways	13.6	8.6	1.9	+ 6.7
United	25.8	9.1	3.1	+ 6.0
El Al	4.6	18.2	14.0	+ 4.2
Eastern	37.6	11.2	7.1	+ 4.1
Philippine Airlines	11.1	14.6	11.0	+ 3.6
Northwest	13.4	11.7	8.6	+ 3.1
Air Lanka	5.0	11.8	9.0	+ 2.8
Ansett Airlines of Australia	7.5	3.1	1.3	+ 1.8
Britannia Airways	6.6	4.0	3.6	+ 0.4
UTA French Airlines	9.4	9.4	9.2	+ 0.2
Western	9.6	2.9	3.2	- 0.3
Aerolinias Argentinas	5.4	11.4	12.3	- 0.9
Continental	9.8	5.0	6.1	- 1.1
BWIA International	4.0	11.9	13.0	- 1.1
Air Lingus	9.9	6.1	7.8	- 1.7
Air Florida	10.2	3.8	10.5	- 6.7
Pan Am	45.1	15.3	22.1	- 6.8
Air India	10.4	12.0	19.2	- 7.2
Dan Air	12.2	2.6	10.1	- 7.5
Mexicana	4.7	2.8	10.5	- 7.7
Alia - Royal Jordanian Airline	9.1	5.2	13.6	- 8.4

Table 16 (Continued)

Airline	% Flown 1984	% Based on airlines flown		
		Preferred (1 of 4)	Avoid (1 of 3)	Difference
Cyprus Airways	7.3	3.2	12.0	- 8.8
China Airlines	9.5	6.1	15.2	- 9.1
Sabena	21.9	6.1	17.0	-10.9
Olympic Airways	14.8	4.3	15.4	-11.1
TAP	9.1	4.5	18.4	-13.9
Iberia	25.3	7.0	21.2	-14.2
Royal Air Maroc	3.5	1.0	16.1	-15.1
Aeromexico	5.6	1.1	16.7	-15.6
Air Afrique	4.4	2.4	18.5	-16.1
Avianca	7.3	5.5	24.3	-18.8
Indian Airlines	7.7	0.9	23.2	-22.3
Viasa	5.0	7.2	30.5	-23.3
Alitalia	32.9	3.7	28.3	-24.6
Pakistan International Airlines	5.6	5.2	32.4	-27.2
Saudi Arabian Airlines	16.1	6.2	34.6	-28.4
Garuda Indonesian Airline	9.2	2.3	32.8	-30.5
THY (Turkish Airlines)	3.5	1.4	37.0	-35.6
Egypt Air	10.3	1.6	45.1	-43.5
Aeroflot	5.2	1.1	60.7	-59.6
Nigeria Airways	4.6	2.2	69.3	-67.1

ROUND TRIP FREQUENCY DURING PAST TWO YEARS

****

Respondents were asked to indicate how many round trips for business and pleasure they had taken within and outside their own country on a commercial airline during the past two years. In addition, they indicated how many of these trips included an overnight stay. 1984 international survey respondents are more likely to take a trip that takes them out of their own country rather than to take a trip that does not. not. In addition most trips do include an overnight stay as shown below.

ROUND TRIP FREQUENCY DURING PAST TWO YEARS

	1984	1981*	1979*
Business:		14.3	16.6
Within country of residence (total)	14.2	--	--
Within country of residence Including overnight stay	9.4	--	--
Outside country of residence (total)	19.2	--	--
Outside country of residence Including overnight stay	16.7	--	--
Pleasure:		2.5	1.8
Within country of residence (total)	2.6	--	--
Within country of residence Including overnight stay	2.0	--	--
Outside country of residence (total)	4.2	--	--
Outside country of residence including overnight stay	3.8	--	--

*Only total figures for business and pleasure round trips available for these years.

The following groups of respondents are the heaviest business travellers:

* Men
* First class flyers
* Business class flyers
* Individuals who have flown on the major international airlines during the past two years.

Women tend to travel for pleasure more frequently than do men, while pleasure travel is relatively consistent across other demographic/ geographical subgroups.

CLASS FLOWN MOST OFTEN
****

The percentage of international survey respondents flying business class more frequently than any other has increased substantially during the past two years, largely at the expense of full fare economy class. However, women are still far more apt to fly economy than business class.

CLASS FLOWN MOST OFTEN

	Today			Two Years Ago		
	Total	Male	Female	Total	Male	Female
First class	12.6%	12.7%	8.1%	15.1%	15.3%	9.0%
Business Class	40.9	41.5	23.6	24.8	25.2	12.3
Economy (Full Fare)	30.9	30.3	48.0	45.1	44.8	54.9
Discount	15.1	15.0	18.3	14.1	14.0	20.5
Holiday charter	0.5	0.5	2.0	0.8	0.8	3.3

CHOOSING A FLIGHT

How Flight is Selected

For both business and pleasure travel, the ultimate choice of flight almost always rests with the passenger him/herself. However, in most instances, the passenger is aided in the decision process by either a travel agent, an airline guide, or an airline brochure.

HOW FLIGHT IS USUALLY SELECTED

	Business Trip	Pleasure Trip
Choose flight myself after consulting with travel agent	36.9%	52.3%
Choose flight myself after referring to airline guide	25.5	18.9
Choose flight myself after referring to airline brochure	14.5	16.7
Choose flight myself after consulting with secretary	6.5	2.1
Choose flight myself after consulting with corporate travel department	4.9	2.2
Travel agent chooses flight	3.7	4.9
Secretary chooses flight	3.6	0.7
Corporate travel department chooses flight	3.5	0.3
Other	1.4	1.9

Most Influential Factor in Choice of a Flight

Schedule is definitely the most important criterion when respondents are choosing a flight that will last for less than two hours. For flights that are more substantial in length (2-5 hours), schedule is still a prime consideration; however, the airline shares equal importance. For flights of more than five hours, the airline becomes the single most important selection factor. Regardless of the flight duration, fare and aeroplane are secondary considerations, although the importance of each increases somewhat as the length of the flight increases.

The increasing importance of airline in choice of flight must however be considered in the light of members ratings of airlines flown and not flown. This indicates that the influence of "airline" in choice of flight will in turn, be very much influenced by the airlines with which the member has previous experience.

MOST INFLUENTIAL FACTOR IN CHOICE OF A FLIGHT

	Length of Flight		
	Under 2 Hours	2-5 Hours	Over 5 Hours
Schedule	70.1%	43.0%	19.3%
Airline	15.5	36.2	53.0
Fare	11.4	13.7	16.5
Aeroplane	2.5	6.6	10.2
Other	0.5	0.6	1.0

The Most Influential Factors in Choice of an Airline

For flights lasting less than two hours, respondents' prime concerns relate to schedule. The factors most frequently included are;

* Convenient schedule (67.9%)
* Frequency of flights (33.8%)
* On-time performance (30.7%)

For longer flights, convenient schedule remains the most critical concern, while frequency of flights and on-time performance diminish in proportion and quality of in-flight service and past experience with the airline take on comparatively high levels of importance.

"PLEASE INDICATE WHICH THREE FACTORS ARE MOST IMPORTANT TO YOU WHEN CHOOSING AN AIRLINE"

	Length of Flight					
	Under 2 Hours		2-5 Hours		Over 5 Hours	
	%	Rank	%	Rank	%	Rank
Convenient schedule	67.8%	1	59.9%	1	44.2%	1
Frequency of flight	33.8	2	13.3	11	6.5	11
On-time performance	30.7	3	22.0	4	16.1	10
Past experience	27.8	4	28.4	3	29.5	3
Low fares	18.0	5	19.1	6	22.0	6
Safety record	17.1	6	18.7	7	22.3	5
Attitude of Personnel	16.8	7	21.4	5	23.6	4
Quality of in-flight service	15.7	8	29.5	2	38.5	2
Aircraft type	10.4	9	14.2	9	21.1	7
Availability of business class	7.8	10	14.1	10	16.2	9
Quality of ground service	6.8	11	5.8	12	4.8	13
National flag carrier	6.6	12	4.9	13	5.3	12
Quality of food and drinks	6.5	13	15.1	8	20.5	8
Frequent flyers programme	3.2	15	3.8	14	4.3	14
Others	1.0	15	0.9	15	1.1	15

Airline Service

At least a quarter of the 1984 international survey respondents rate the following airline services as one of the three most important:

* Fast check-in (47.3%)
* Flight attendant attitude/behaviour (45.5%)
* Leg room (45.1%)
* Pre-reserved seat assignment (39.3%)
* Quick baggage retrieval (33.3%)
* Seat width (25.5%)

However, at least a quarter of the respondents also indicate that these important services generally need improvement, with the level of need for improvement expressed being especially high for fast check-in (53.3%), legroom (52.6%) and quick baggage retrieval (64.9%).

EVALUATIONS OF AIRLINE SERVICES

	Among the 3 Most Important Services	Needs Improvement
Fast Check-in	47.3%	53.5%
Flight Attendant Attitude/Behaviour	45.5	31.7
Leg-room	45.1	52.6 (2)
Pre-reserved Seat Assignment	39.3	26.8
Quick Baggage Retrieval	33.3	64.9
Seat Width	25.5	38.0 (3)
Food Service	18.9	24.4
Special First-class and Business class Lounges	16.9 (1)	14.1 (4)
Carry-on Baggage Compartments	11.1	29.8
Adequate Waiting Areas	6.4	24.9
Beverage Service	4.4	8.5
In-flight Audio/Video Entertainment	4.3	10.3
Magazines and Newspapers	2.7	11.8

(1) 40.3% First class flyers
24.9% Business class flyers
3.8% Economy class flyers
2.1 Discount class flyers

(2) 36.0% First class flyers
50.0% Business class flyers
57.2% Economy class flyers
62.1% Discount class flyers

(3) 27.0% First class flyers
37.4% Business class flyers
40.0% Economy class flyers
40.1% Discount class flyers

(4) 21.5% First class flyers
23.6% Business class flyers
4.1% Economy class flyers
1.4% Discount class flyers

ATTITUDES TOWARD AIRFARES
****

The vast majority of the respondents consider current airfares to be "expensive", with equal proportions describing them as "very expensive" (39.7%) and "somewhat expensive" (41.7%). This finding is generally true regardless of demographic differences, with just one noteworthy exception; one-third of the Asian respondents describe airfares as "about what you would expect".

HOW EXPENSIVE CONSIDER AIRFARES

	Total	Asia
Very expensive	39.7%	18.1%
Somewhat	41.7	46.5
About what you would expect	16.9	31.4
Somewhat inexpensive	1.5	3.0
Very expensive	0.2	1.0

With regard to regulation of air fares, most IAPA travellers are aware of the differences between U.S. and European policies. Furthermore, the vast majority of the respondents believe that deregulation would benefit the European traveller.

	Yes	No
Aware of differences between U.S. and European pricing regulations?	82.1%	17.9%
Think that abolition of pricing regulations would benefit European business traveller?	86.0	14.0

****

AIRCRAFT PREFERENCES

****

AIRCRAFT FLOWN ON DURING PAST TWO YEARS

****

Respondents were provided with a list of various aircraft and indicated on which they had flown during the past two years. Similar to findings in 1981 and 1979, the Boeing 747 is the most frequently flown aircraft, with the Boeing 727, McDonnell Douglas DC-10, and Boeing 737 trailing closely behind.

AIRCRAFT FLOWN ON DURING PAST TWO YEARS

	1984	1981	1979*
747	91.3%	90.5%	91.6%
727	80.0	80.3	89.5
DC-10	79.2	80.6	77.6
737	78.8	70.1	80.3
A300	69.2	64.0	64.8
DC-9	65.9	68.7	83.1
L1011	51.6	51.5	54.2
BAC 1-11	43.3	--	--
A310	38.8	--	--
DC-8	38.4	55.1	71.8
F-28	36.0	--	--
DC-9/80	27.7	--	--
757	19.5	--	--
767	11.2	--	--
Concorde	10.0	12.3	15.6

* No time limit specified

IMPORTANT FACTORS IN PREFERENCE OF AN AIRCRAFT

****

For a flight of less than two hours duration, almost half of the 1984 international survey respondents indicate that safety (47.5%) and overall comfort (44.7%) are among the most important criteria in their preference of an aircraft. In addition, one-third name leg-room (37.1%) and past experience with this type of aircraft (31.6%) as important factors. For longer flights, comfort, leg-room and spaciousness take on increased importance, with safety becoming a slightly lesser consideration and past experience becoming a relatively low priority. Women are markedly more concerned with safety than are men.

IMPORTANT FACTORS IN PREFERENCE TO AN AIRCRAFT

	Under 2 Hours		2-5 Hours		Over 5 Hours	
	%	Rank	%	Rank	%	Rank
Safety	47.5%(1)	1	43.1%(2)	3	42.8%(3)	4
Overall comfort	44.7	2	48.4	1	50.8	1
Legroom	37.1	3	43.5	2	44.3	3
Past experience	31.6	4	25.4	5	23.0	7
Spaciousness	29.3	5	38.5	4	44.7	2
Noise Level	23.6	6	23.5	7	22.3	8
Baggage Storage	19.1	7	11.4	8	8.5	10
Seat Width	18.1	8	24.1	6	25.6	5
Reputation	13.8	9	10.2	9	9.4	9
Manufacturer	4.9	10	4.5	10	4.3	10
Overall Size	4.5	11	4.1	11	4.1	11

(1) Males 46.9% vs. females 63.9%

(2) Males 42.5% vs. females 59.8%

(3) Males 42.2% vs. females 57.5%

MOST PREFERRED AIRCRAFT
****

For short flights (lasting under 2 hours) the Airbus Industrie A300 is the most commonly preferred type of aircraft, with a quarter of all respondents naming it. For longer flights, especially those lasting more than 5 hours, the Boeing 747 is by far the most popular aircraft.

MOST PREFERRED AIRCRAFT AMONG 1984 SURVEY INTERNATIONAL SURVEY RESPONDENTS

	Under 2 Hours		2-5 Hours		Over 5 Hours	
	%	Rank	%	Rank	%	Rank
A300	25.1%	1	17.5%	2	2.0%	5
737	14.2	2	2.9	9	0.6	9
727	10.9	3	3.6	7	0.4	10
A310	10.3	4	8.7	5	1.0	7
747	7.9	5	31.3	1	71.2	1
DC-9	7.0	6	1.5	11	0.1	11
757	5.6	7	3.6	7	1.4	6
DC9/80	5.1	8	1.5	11	0.1	11
L-1011	3.7	9	10.9	3	6.3	4
BAC 1-11	3.1	10	0.7	13	0.1	11
DC-10	2.4	11	10.4	4	9.2	2
F-28	1.8	12	0.2	15	0.1	11
767	1.8	13	2.3	10	0.8	8
Concorde	0.7	14	4.3	6	6.6	3
DC-8	0.5	15	0.6	14	0.1	11

AIRCRAFT THAT WOULD BE AVOIDED

For flights lasting up to five hours, respondents most commonly avoid the BAC 1-11 and the F-28. On flights that last more than five hours, survey participants would seek to avoid the McDonnell Douglas DC-10 and the DC-8.

AIRCRAFT THAT WOULD BE AVOIDED BY 1984 IAPA SURVEY RESPONDENTS

	Flight Duration					
	Under 2 Hours		2-5 Hours		Over 5 Hours	
	%	Rank	%	Rank	%	Rank
BAC 1-11	22.9%	1	15.7%	1	9.0%	4
F-28	19.5	2	14.6	2	12.5	3
DC-10	10.1	3	14.2	3	24.1	1
DC-8	8.3	4	13.2	4	18.6	2
727	7.3	5	10.8	5	8.6	5
737	7.2	6	9.8	6	5.1	7
DC9	7.2	7	9.2	7	6.2	6
747	7.0	8	2.5	9	2.8	10
Concorde	3.7	9	1.6	11	2.1	11
A300	3.1	10	3.4	8	3.7	9
L-1011	1.6	11	2.3	10	4.8	8
757	0.8	12	1.0	12	0.7	13
A310	0.6	13	0.8	13	0.9	12
DC-9/80	0.4	14	0.7	14	0.6	14
767	0.1	15	0.1	15	0.2	15

PERCEPTIONS OF COMMERCIAL AIRCRAFT MANUFACTURERS

****

Respondents were asked to indicate which of the five major aircraft manufacturers they feel produces the best commercial aircraft. Overall, an overwhelming majority think of Boeing as the best commercial aircraft manufacturer (up substantially from its number 1 percentage rating in 1981). In France and Germany, Airbus Industrie has a reputation that is equally as positive as Boeing's.

AIRCRAFT MANUFACTURER PERCEIVED TO PRODUCE
THE BEST COMMERCIAL AIRCRAFT

	1981 Total	1984 Total	United Kingdom	France	Germany	Middle East	Asia
Boeing	59.8%	68.4%	67.9%	47.2%	44.9%	70.1%	84.7%
Airbus Industrie	16.2	16.6	15.4	45.5	47.8	11.8	8.4
McDonnell Douglas	11.3	7.9	4.3	4.3	4.8	4.6	3.9
Lockheed	8.9	4.4	6.0	0.9	1.8	10.0	2.3
British Aerospace	3.6	2.3	6.0	0.4	0.4	3.1	0.5
Other	1.4	0.5	0.3	1.7	0.4	0.4	0.2

SMOKING ON THE AIRCRAFT

****

With consistent findings in all subgroups, 71.2% of the 1984 respondents usually sit in the non-smoking section of the plane, while 28.8% sit in the smoking area. Regarding a potential smoking ban against smoking on short flights (less than two hours), a majority (57.9%) would favour such a ruling, while one in five (21.1%) is indifferent and an additional one-fifth (20.9%) are opposed. Half (51.4%) of those responding would favour a smoking ban on longer flights (two hours or more), while almost one-fifth (17.9%) are indifferent and 30.8% would oppose such a restriction. Again, these findings hold true in all subgroups.

SECTION OF AEROPLANE 1984 INTERNATIONAL SURVEY RESPONDENTS USUALLY OCCUPY

Smoking	28.8%
Non-Smoking	71.2

REACTIONS TO PROPOSED CIGARETTE SMOKING BAN

	On flights less than two hours	On flights of two hours of more
Strongly in Favour	45.4%	33.5%
Somewhat in Favour	12.5	17.9
Makes no Difference	21.1	17.9
Somewhat Opposed	6.9	7.5
Strongly Opposed	14.0	23.3

****

AIRPORT FACILITIES

****

AIRPORTS FLOWN INTO DURING PAST TWO YEARS

****

The airports most frequently used by International passengers during the past two years (i.e., those mentioned by at least 50% of the 1984 international survey respondents) are:

* London (Heathrow) (77.9%)
* Amsterdam (53.0%)
* New York (Kennedy) (52.5%)
* Paris (de Gaulle) (52.2%)
* Frankfurt (51.6%)

(see Table 16 for details)

By country of residence, the most commonly frequented airports (flown into by at least half of the respondents) are:

United Kingdom

London (Heathrow) (96.7%)
London (Gatwick) (76.5%)
Amsterdam (60.8%)
Paris (de Gaulle) (58.2%)

Germany

Frankfurt (93.8%)
London (Heathrow) (76.2%)
Zurich (66.9%)
New York (Kennedy) (62.8%)
Paris (de Gaulle) (59.8%)
Amsterdam (57.5%)

France

Paris (de Gaulle) (94.0%)
Paris (Orly) (85.0%)
London (Heathrow) (82.4%)
Geneva (66.7%)
New York (Kennedy) (64.4%)
Frankfurt (59.9%)
Amsterdam (52.4%)
Zurich (51.7%)

Middle East

London (Heathrow) (82.3%)

Asia

Hong Kong (85.5%)
Singapore (74.5%)
London (Heathrow) (61.0%)
Los Angeles (50.0%)

Table 17

AIRPORTS FLOWN INTO DURING PAST TWO YEARS
BY 1984 IAPA SURVEY RESPONDENTS

London (Heathrow)	77.9%
Amsterdam	53.0
New York (Kennedy)	52.5
Paris (de Gaulle)	52.2
Frankfurt	51.6
London (Gatwick)	46.4
Zurich	42.5
Geneva	38.1
Paris (Orly)	33.4
Los Angeles	31.6
Hong Kong	31.0
Singapore	31.0
New York (La Guardia)	28.8
Miami	28.4
Copenhagen	28.2
Rome	27.8
Bangkok	27.5
Brussels	27.5
Athens	26.6
San Francisco	24.9
Chicago (O'Hare)	22.8
Madrid	22.1
Tokyo	20.9
Milan (Linate)	20.4
Abu Dhabi	18.6
Stockholm	18.3
Boston	16.4
Cairo	15.7

Table 17 (Continued)

Bombay	15.3
Dallas/Fort Worth	15.2
Houston (International)	14.8
Washington, D.C.	14.8
Oslo	13.5
Honolulu	13.5
Sydney	12.2
Lisbon	12.1
Toronto	12.1
Montreal	10.9
Las Vegas	10.2
Rio De Janeiro	10.1
Newark	9.8
Berlin (Tegel)	9.5
Dublin	9.4
Johannesburg	9.2
Glasgow	9.2
Orlando	8.9
Denver	8.5
Mexico City	8.4
New Orleans	8.3
Anchorage	8.1
Seoul	8.1
Rotterdam	7.9
Osaka	7.8
Seattle/Tacoma	7.5
Bogota	7.0
Tel Aviv	6.4
Panama	6.2
Minneapolis/St. Paul	6.2

Table 17 (Continued)

Lagos	6.1
Vancouver	6.0
Philadelphia	5.9
Detroit	5.7
St. Louis	4.8
Perth	4.6
Orlando	4.6
Santiago	4.3
Pittsburgh	3.5
Others	57.4

To further clarify the frequency with which various airports have been used, 1984 respondents were asked to indicate which they have used most frequently. The findings are similar to those indicated above, as indicated in Table 18.

Table 18

AIRPORTS MOST FREQUENTLY USED
BY COUNTRY OF RESIDENCE
(10% or more mentions)

Total	U.K.	France	Germany	Middle East	Asia
London 57.3% (Heathrow)	London 93.9% (Heathrow)	Paris 81.8% (de Gualle)	Frankfurt 83.8%	London 65.4% (Heathrow)	Hong Kong 62.4%
New York 26.8 (Kennedy)	London 47.2 (Gatwick)	London 44.3 (Heathrow)	London 45.5 (Heathrow)	New York 26.9 (Kennedy)	Singapore 54.3
Amsterdam 25.3	Amsterdam 31.9	Paris 36.8 (Orly)	Zurich 37.9	Amsterdam (23.1)	Tokyo 40.5
Frankfurt 23.1	Paris 23.0 (de Gaulle)	New York 33.6	New York 35.8	Frankfurt 20.0	Bangkok 31.7
Paris 19.6 (de Gualle)	New York (Kennedy) 20.9	Geneva 24.5	Amsterdam 21.2	Paris 17.7 (de Gaulle)	London (Heathrow) 28.6
Zurich 18.3	Frankfurt 13.3	Frankfurt 22.9	Paris 17.9 (de Gualle)	Zurich 17.2	New York (Kennedy) 17.5
London 16.8 (Gatwick)	Zurich 10.4	Amsterdam 16.2	Singapore 10.0	Singapore 12.8	Los Angeles 16.5
Singapore 14.7	Geneva 10.2	Zurich 16.2		Abu Dhabi 11.1	San Francisco 15.4
Copenhagen 11.7					Amsterdam 11.7
Hong Kong 11.7					Frankfurt 10.2

EVALUATIONS OF AIRPORT SERVICES AND FACILITIES

1984 International survey respondents indicated from a list which airport services and facilities are most important to them in their evaluation of an airport. In addition, they indicated which items they feel generally need improvement. Results are stable across demographic/geographic subgroups.

The factors that are most important to the airport evaluation process (selected by at least 20% of those responding) are:

* Quick baggage claim (63.1%)
* Quick and easy check-in (44.1%)
* Rapid customs clearance (40.6%)
* Ease of changing planes (31.1%)
* Short walking distance (27.6%)
* Comfortable waiting areas/lounges (20.5%)

By far, the most important evaluation criterion for an airport is quick baggage claim, as 63.1% of those responding include this in the top three factors. In addition, this is by far the factor most commonly cited as needing improvement, as 69.7% of the respondents indicate that this is so. (See Table 18 for details).

Between 35% and 55% of the respondents feel that each of the other airport factors generally needs improvement.

Table 19

1984 SURVEY RESPONDENTS' EVALUATIONS OF AIRPORT SERVICES AND FACILITIES

	Most important factors in airport evaluation	Needs improvement
Quick baggage claim	63.1%	69.7%
Quick and easy check-in	44.1	50.3
Rapid customs clearance	40.6	56.1
Ease of changing planes	31.1	36.8
Short walking distance	27.6	42.0
Comfortable waiting areas/lounges	20.5	38.9
Jetways (loading bridges)	14.1	11.6
Good security	11.6	14.5
Cleanliness	11.3	31.4
Moving walkways	10.9	22.5
Internatonal signs/directions/information	6.2	13.5
Duty-free shops	5.9	9.3
Availability of ground transportation	5.2	13.6
Frequent transportation between terminals	3.2	15.6
Good restaurants	2.8	20.0
Nearby parking facility	2.6	11.1
Frequently placed schedule monitors	2.6	12.2
News stands	0.6	2.6
Other	0.9	2.0

BEST LIKED AIRPORT OVERALL

Similar to previous years' findings, Amsterdam is the most popular overall, although in current results, it is somewhat less popular than in 1981 and 1979. This year, Singapore is the second most common choice for best liked airport. This airport has gained substantially in popularity over the last five years; in 1979 only 1.8% of the survey respondents indicated that it was the best liked, versus 14.5% in current findings.

AIRPORTS LIKED BEST OVERALL
(Top ten)

	1984	1981	1979
Amsterdam	20.6%	25.9%	24.8%
Singapore	14.5	8.4	1.8
Zurich	9.5	9.8	6.8
Frankfurt	7.8	11.7	10.6
London (Heathrow)	7.8	5.6	10.6
Paris (de Gaulle)	5.6	7.9	6.3
London (Gatwick)	3.9	--	--
Geneva	3.0	1.9	2.1
Miami	2.7	--	--
New York (Kennedy)	2.0	2.2	2.6

However as with airlines, members ratings of airports is greatly influenced by experience (see page 57).

By country of residence, the best liked airports (named by at least 10% of the respondents) are as follows:

BEST LIKED AIRPORTS

United Kingdom	France	Germany	Middle East	Asia
Amsterdam (25.7%)	Paris (35.6%)	Frankfurt (27.0%)	Amsterdam (19.0%)	Singapore (50.5%)
London (Heathrow) (17.0%)	Amsterdam (11.4%)	Zurich (14.9%)	London (Heathrow) (13.9%)	
Singapore (11.6%)	Singapore (11.0%)	Amsterdam (12.0%)	Singapore (12.8%)	
London (Gatwick) (10.5%)			Zurich (10.3%)	

LEAST LIKED AIRPORT OVERALL

****

As in past years, London's Heathrow airport is the least liked by international survey participants, although this is true of substantially fewer respondents this year (17.0%) than five years ago (30.7%). New York's Kennedy Airport ranks number two as least liked, and has received an increasing number of "least liked" ratings since 1979.

TEN AIRPORTS LIKED LEAST

	1984	1981	1979
London (Heathrow)	17.0%	20.1%	30.7%
New York (Kennedy)	8.7	5.2	3.0
Cairo	4.8	2.7	2.0
Los Angeles	4.2	3.8	1.8
Rome	3.9	2.0	2.3
Bombay	3.8	2.4	2.8
Milan (Linate)	3.6	2.0	--
Bangkok	2.3	--	--
Athens	2.9	--	--
Paris (de Gaulle)	2.6		

By country, the least liked airports (named by at least 5% of the respondents) are presented below;

LEAST LIKED AIRPORTS

United Kingdom	France	Germany	Middle East	Asia
London (Heathrow) (22.5%)	London (Heathrow) (23.8%)	London (Heathrow) (24.3%)	London (Heathrow) (13.4%)	Bangkok (14.2%)
New York (JFK) (7.5%)	New York (JFK) (9.5%)	New York (JFK) (13.3%)	Cairo (10.6%)	Los Angeles (11.2%)
Cairo (5.5%)	Cairo (5.6%)	Frankfurt (8.3%)	New York (JFK) (8.0%)	London (Heathrow) (9.4%)
	Paris (Orly) (5.2%)	Milan (Linate) (5.0%)	Athens (6.7%)	Bombay (8.5%)
				Tokyo (5.3%)

Ratings of airports flown into during past two years

A ranking of airports like most and least when analysed by airport usage and experience indicates a somewhat different order of ranking than previously indicated.

As table 20 shows, Singapore at +43.9% has the highest rating with Amsterdam and Zurich in second and third places. Airports with the lowest ratings are Lagos -37.7%, Cairo -27.6% and Bombay -22.7%.

Of the major international airports New York/Kennedy -11.9%, Rome -11.1% and London Heathrow (-11.3%) emerge with the lowest ratings.

Table 20

Respondents ratings of airports flown into during the past two years

Airport	% Members	% Based on those airports used		
	Flown Into	Liked Most (1 only)	Liked Least (1 only)	Difference
Singapore	31.0	44.3	0.4	+43.9
Amsterdam	53.0	36.3	0.4	+35.9
Zurich	42.5	20.7	0.6	+20.1
Frankfurt	51.6	14.4	2.8	+11.6
Geneva	38.1	7.7	0.9	+ 6.8
London (Gatwick)	46.4	8.1	2.7	+ 5.4
Dallas (Fort Worth)	15.2	6.3	0.9	+ 5.4
Paris (de Gaulle)	52.2	9.9	4.5	+ 5.4
Seattle (Tacoma)	7.5	5.2	0.2	+ 5.0
Stockholm	18.3	5.9	1.4	+ 4.5
Rio de Janeiro	10.1	6.0	1.8	+ 4.2
Miami	28.4	9.5	6.2	+ 3.3
Panama	6.2	6.6	3.4	+ 3.2
San Fransisco	24.9	3.5	1.1	+ 2.4
Houston (International)	14.8	3.3	1.2	+ 2.1
Berlin (Tegel)	9.5	2.7	0.8	+ 1.9
Tokyo	20.9	4.8	3.3	+ 1.5
Washgington DC	14.8	2.7	1.2	+ 1.5
Honolulu	13.5	2.3	1.0	+ 1.3
Minneapolis/St. Paul	6.2	1.4	0.2	+ 1.2
Toronto	12.1	3.1	2.2	+ 0.9
Boston	16.4	2.0	1.7	+ 0.3
Vancouver	6.0	1.6	1.3	+ 0.3
Newark	9.8	2.2	2.0	+ 0.2
Philadelphia	5.9	2.3	2.2	+ 0.1
Copenhagen	28.2	4.7	5.0	- 0.3
Sydney	12.2	1.8	2.2	- 0.4
Montreal	10.9	1.7	2.1	- 0.4
Las Vegas	10.2	0.2	0.6	- 0.4
Rotterdam	7.9	0.9	1.4	- 0.5
Detroit	5.7	0.4	0.9	- 0.5
Anchorage	8.1	0.3	0.9	- 0.6
Pittsburgh	3.5	-	0.7	- 0.7
Osaka	7.8	0.8	1.6	- 0.8

Airport	% Members Flown Into	% Based on those airports used: Liked Most (1 only)	Liked Least (1 only)	Difference
Johannesburg	9.2	3.8	5.0	- 1.2
Glasgow	9.2	2.0	3.3	- 1.3
Abu Dhabi	18.6	1.4	2.7	- 1.3
New Orleans	8.3	0.9	2.3	- 1.4
Tel Aviv	6.4	2.8	4.5	- 1.7
Paris (Orly)	33.4	1.2	3.0	- 1.8
Hong Kong	31.0	3.1	5.3	- 2.2
Brussels	27.5	2.1	4.4	- 2.3
Dublin	9.4	0.7	3.0	- 2.3
Chicago(O'Hare)	22.8	2.3	5.1	- 2.8
New York (La Guardia)	28.8	0.4	3.2	- 2.8
Seoul	8.1	0.4	4.3	- 3.9
Perth	4.6	0.5	4.9	- 4.4
Madrid	22.1	1.0	6.0	- 5.0
Mexico City	8.4	0.3	7.1	- 6.8
Oslo	13.5	0.6	8.3	- 7.7
Lisbon	12.1	0.2	8.9	- 8.7
Athens	26.6	0.5	10.3	- 9.8
Santiago	4.3	0.3	10.6	-10.3
Bangkok	27.5	0.6	11.4	-10.8
Los Angeles	31.6	0.9	12.0	-11.1
London (Heathrow)	77.8	9.5	20.8	-11.3
Rome	27.8	0.8	12.5	-11.7
New York (Kennedy)	52.5	3.5	15.4	-11.9
Milan (Linate)	20.4	0.2	16.5	-16.3
Bogota	7.0	0.5	17.3	-22.7
Bombay	15.3	0.2	22.9	-22.7
Cairo	15.7	0.2	27.8	-27.6
Lagos	6.1	-	37.7	-37.7

ATTITUDES TOWARD VIP CLUB LOUNGES

Overall, slightly over half (57.4%) of the respondents indicate that the availability of an airport VIP lounge is important to them. A VIP lounge is more important to first and business class passengers (especially the former) than to those flying on an economy or discount basis.

IMPORTANCE OF AVAILABILITY OF AIRPORT VIP CLUB LOUNGE
TO 1984 INTERNATIONAL SURVEY RESPONDENTS

	Total	First	Business	Economy	Discount
Very important	20.0%	39.1%	22.3%	13.1%	10.2%
Somewhat important	37.4	40.4	42.9	31.8	31.1
Not very important	31.1	17.1	26.9	38.9	37.9
Not at all important	11.5	3.4	7.9	16.1	20.9

Two-thirds of the survey participants express positive interest in the possibility of purchasing a multiple carrier VIP club access card.. Again, first and business class travellers express greater levels of interest in this notion than do economy discount flyers.

1984 INTERNATIONAL RESPONDENTS' LEVELS OF INTEREST
IN PURCHASING A MULTIPLE CARRIER VIP ACCESS CARD

	Total	First	Business	Economy	Discount
Very interested	28.1%	42.7%	32.1%	20.9%	19.0%
Somewhat interested	39.3	36.1	41.6	37.9	37.6
Not very interested	22.9	15.5	19.8	27.8	27.6
Not at all interested	9.7	5.7	6.6	13.3	15.8

PURCHASING DUTY-FREE GOODS

****

Three-quarters of this year's international survey participants report that they purchase duty-free goods very often (53.8%) or somewhat often (22.5%) on international flights.

HOW OFTEN 1984 INTERNATIONAL SURVEY RESPONDENTS PURCHASE DUTY-FREE GOODS ON INTERNATIONAL FLIGHTS

Very often	53.8%
Somewhat often	22.5
Not very often	21.5
Not at all	2.2

As it stands now, the vast majority of those who purchase duty-free goods do so when departing for their home city (86.9%) rather than upon arrival in the home city (13.1%).

Over half of the respondents would like to make their duty-free purchases upon arrival at home instead of at the departure airport, and only one in ten would object to doing so.

1984 INTERNATIONAL SURVEY RESPONDENTS' ATTITUDES TOWARD PURCHASING DUTY-FREE GOODS AT HOME AIRPORT AFTER ARRIVAL

Like strongly	49.9%
Like somewhat	9.6
Don't care	29.3
Object somewhat	5.5
Object strongly	5.7

No noteworthy demographic differences emerge from the above findings.

****

HOTEL FACILITIES

****

HOTEL/MOTEL USAGE DURING THE PAST TWO YEARS

Over the past two years, the typical 1984 international survey respondent has stayed in a hotel or motel 91.3 nights for business and 28.7 nights for pleasure. French respondents are especially heavy business travellers, while individuals from the Middle East tend to travel more for pleasure than average. Residents of Germany indicate slightly higher than average levels of both business and pleasure travel.

In addition, males and all passengers flying in first or business class more frequently stay in hotels for business than do females and individuals flying economy or discount.

MEAN NUMBER OF NIGHTS STAYED IN A HOTEL/MOTEL
DURING THE PAST TWO YEARS FOR:

	Business	Pleasure
Country of Residence:		
United Kingdom	97.5	28.0
France	112.7	26.7
Germany	103.7	33.6
Middle East	63.6	40.4
Asia	96.3	24.9
Class Flown:		
First	94.0	32.9
Business	109.7	26.6
Economy	75.1	27.3
Discount	70.2	32.1
Sex:		
Male	92.0	28.5
Female	60.4	35.2
Total	91.3	28.7

With regard to the actual hotels patronised during the last two years, the most popular chains have been Holiday Inns, Hilton, Inter-Continental and Sheraton, as about two-thirds of the respondents have stayed in each. The total percentage of respondents having stayed in each hotel chain during the past few years is presented in table 21.

Table 21

HOTEL CHAINS STAYED IN DURING THE PAST TWO YEARS BY
1984 INTERNATIONAL SURVEY RESPONDENTS

Holiday Inns	68.3%
Hilton	67.8
Inter-Continental	61.1
Sheraton	60.8
Hyatt/Hyatt Regency	47.8
Trusthouse Forte	44.2
Marriott	34.7
Ramada Inns	29.9
Crest Hotels	28.4
Meridien Hotels	27.5
Best Western	27.0
Novotel	26.8
Westin	24.7
Penta Hotels	20.0
Mandarin Hotels	17.0
Steigenberger Hotels	16.4
SAS Hotels	16.4
Sofitel Hotels	16.0
Oberoi Hotels	13.4
Forum Hotels	8.9
Ciga Hotels	8.4
Thistle Hotels	8.3
Concorde Hotels	7.5
TAJ Hotels International	6.9
Jolly Hotels	6.8
Ladbroke Hotels	6.6
Canadian Pacific	6.1
Frantel	5.8
PLM/ETAP	4.6
Rank Hotels	3.8
Stouffer	2.8
Horsa	1.7
Others	13.2

In addition, the most prominent geographic/demographic group differences are as follows;

Residents of the United Kingdom have frequented the following chains more than average:

* Trusthouse Forte (69.2%)
* Crest Hotels (47.8%)
* Thistle Hotels (22.4%)
* Ladbroke Hotels (19.2%)

French respondents indicate above average levels of patronage of these hotels:

* Meridien (50.2%)
* Novotel (58.1%)
* Sofitel (40.0%)
* Concorde Hotels (23.4%)
* Frantel (29.8%)
* PLM/ETAP Hotels (18.9%)

Among German respondents, the following hotel chains have been more popular than average:

* Inter-Continental (74.0%)
* Ramada Inns (40.0%)
* Crest Hotels (46.3%)
* Novotel (49.3%)
* Penta Hotels (37.3%)
* Steigenberger Hotels (57.9%)
* Canadian Pacific (18.2%)

Middle Eastern travellers have spent less time than average at

* Crest Hotels (15.5%)
* Novotel (15.7%)

Among Asian respondents, the Hyatt (59.7%), Westin (42.4%) and Mandarin Hotels (42.4%) have been above average popularity, while the following chains have been patronised less often than average:

* Trusthouse Forte (20.2%)
* Marriott (22.4%)
* Crest Hotels (12.6%)
* Best Western (16.5%)
* Novotel (10.6%)
* Penta Hotels (9.6%)

First Class flyers patronise the following hotel chains more than average;

* Hilton (80.2%)
* Inter-Continental (75.9%)
* Sheraton (71.8%)
* Westin (36.0%)
* Mandarin Hotels (27.3%)

At the same time discount travellers have stayed at the following hotels less often than average:

* Hilton (51.2%)
* Inter-Continental (42.9%)
* Sheraton (46.3%)
* Hyatt/Hyatt Regency (37.1%)

Finally, the following hotels chains appear to have had a particularly strong position in the "heavy business traveller" (at least 25 trips during the past 2 years) market:

* Hilton (79.8%)
* Inter-Continental Hotels (73.2%)
* Sheraton (71.7%)
* Hyatt/Hyatt Regency (57.7%)
* Marriott (44.5%)
* Novotel (37.5%)

HOTEL PRICES

1984 International respondents report spending an average of $84.50 per night for business accommodations and $70.70 for pleasure accommodations. Middle Eastern respondents spend far more than others for their hotel accomodations, while residents of Germany have lower than average hotel expenditures. In addition, hotel expenditures show a strong positive correlation to the airline class flown.

AVERAGE HOTEL ROOM EXPENDITURES PER NIGHT FOR:

Country of residence:	Business	Pleasure
United Kingdom	$80.90	$62.40
France	84.30	64.80
Germany	73.50	58.10
Middle East	98.00	85.60
Asia	89.40	76.30
Class Flown:		
First	$117.30	$108.10
Business	86.20	89.00
Economy	74.40	63.10
Discount	71.80	58.40
Total	84.50	70.70

PERCEIVED EXPENSE OF HOTEL COSTS

Very Expensive	30.8%
Somewhat Expensive	49.2
About What You'd Expect	19.3
Somewhat Inexpensive	0.6
Very Inexpensive	0.1

SELECTION OF HOTEL ACCOMMODATION

****

Regardless of demographic/geographic group, 1984 international survey respondents generally choose their hotel accommodation themselves.

WHO SPECIFIES THE HOTEL/MOTEL USED FOR:

	Business Trips	Pleasure Trips
Self	82.2%	94.0%
Travel agent	3.4	4.8
Company travel department	4.0	0.2
Dictated by company policy	3.4	0.0
Business associate at destination	3.8	0.2

Except where noted, respondents agree upon the relative importance of several factors in the choice of a hotel or motel as follows:

THE THREE MOST IMPORTANT FACTORS CONSIDERED IN CHOOSING A HOTEL

Location		89.5%
Past Experience		71.5
IAPA Discount	(1)	33.1
Low Price	(2)	23.4
Special Services/Amenities	(3)	22.3
Airport Shuttle Availability		15.2
Corporate Rate		14.6
Executive Floor/Suites Available	(4)	5.2
Choice of Smoking/Non-Smoking Accommodations		4.1
Frequent Flyer Programme Tie-in		2.6
Meeting/Convention Facilities		2.4
Other		8.0

(1) Class Flown

First	Business	Economy	Discount
22.3%	29.5%	38.6%	38.4%

(2) Class Flown

First	Business	Economy	Discount
10.1%	15.3%	29.6%	42.6%

(3) 31.6% For First Class Travellers

(4) 15.2% For First Class Travellers

TYPE OF HOTEL ACCOMMODATION USED
****

Overall, when travelling for business about half of the current International respondents most frequently stay in "four star/superior" hotel accommodation and an additional one-third choose "top of the line," (i.e., "five star/deluxe") lodging. Middle East residents and first class passengers lean relatively heavily toward five star accommodation for business travel.

For pleasure travel, most respondents choose either four star/superior or three star/standard lodging. Again, Middle Eastern respondents and individuals flying first class are more apt than others to lean toward deluxe accommodation.

TYPE OF LODGING USED MOST OFTEN

	Five Star Deluxe	Four Star Superior	Three Star Standard	Two Star Economy
For Business:				
Country of Residence:				
United Kingdom	24.6%	55.4%	17.8%	2.3%
France	29.7	46.3	21.1	2.8
Germany	21.8	58.7	18.3	1.3
Middle East	54.7	33.4	10.3	1.5
Asia	36.0	42.2	17.3	4.5
Class Flown:				
First	65.1	30.0	4.7	0.2
Business	33.9	53.8	11.4	0.9
Economy	20.6	48.7	27.2	3.5
Discount	19.1	47.0	28.2	5.6
Total	32.0	48.0	17.7	2.3
For Pleasure:				
Country of Residence:				
United Kingdom	14.3%	35.9%	40.2%	2.7%
France	16.9	34.2	36.3	12.7
Germany	14.3	40.8	36.6	8.4
Middle East	31.8	42.0	22.0	4.2
Asia	21.9	38.7	29.8	9.6
Class Flown:				
First	44.7	39.4	13.2	2.7
Business	18.1	39.8	35.4	6.7
Economy	13.2	36.9	39.1	10.9
Discount	12.1	34.2	38.3	15.4
Total	19.4	38.0	34.0	8.6

OVERALL EVALUATIONS OF HOTEL CHAINS

Favourite Hotel Chain

With generally consistent results in the demographic/geographic sub-groups, respondents name the following hotel chains as their favourites:

TOP TEN FAVOURITE HOTEL CHAINS

Inter-Continental	16.7%
Hyatt/Hyatt Regency	12.8
Hilton	12.2
Sheraton	10.5
Holiday Inns	10.4
Marriott	4.9
Mandarin Hotels	4.6
Trusthouse Forte	4.6
Westin Hotels	4.0
Steigenberger Hotels	2.1
Others	17.2

Hotel Chain with the Best Service

Similar to the findings for the favourite hotel, respondents agree that the following chains provide the best service.

HOTEL CHAIN WITH THE BEST SERVICE

Inter-Continental	16.6%
Hyatt/Hyatt Regency	13.9
Hilton	11.7
Sheraton	10.3
Mandarin Hotels	6.9
Holiday Inns	6.8
Marriott	5.1
Westin Hotels	4.3
Trusthouse Forte	3.7
Steigenberger	2.6
Others	18.1

Hotel Chain with the Poorest Service

The hotel chain most frequently singled out as having the poorest service is Holiday Inns. With similar findings in the subgroups, the following chains are generally chosen as offering the worst service.

HOTEL CHAIN WITH THE POOREST SERVICE

Holiday Inns	18.0%
Trusthouse Forte	9.4
Novotel*	9.0
Hilton	7.8
Sheraton	6.4
Ramada Inns	5.9
Crest Hotels	5.3
Penta Hotels	4.3
Best Western	4.1
Meridien Hotels	3.8
Inter-Continental	3.6
Sofitel	2.8
Hyatt/Hyatt Regency	2.1
Other	17.5

* 18.2% in France, 21.0% in Germany

Hotel Chains With the Best Facilities

In keeping with evaluations for the favourite chain and chain with the best service, respondents feel that these hotel chains generally provide the best facilities.

HOTEL CHAINS WITH THE BEST FACILITIES

Inter-Continental	17.6%
Hyatt/Hyatt Regency	15.1
Hilton	14.0
Sheraton	12.2
Holiday Inns	7.9
Mandarin Hotels	5.3
Marriott	5.0
Westin Hotels	4.2
Trusthouse Forte	3.1
Meridien Hotels	2.2
Other	13.4

Hotel Chains With the Poorest Facilities

As with service, Holiday Inns is the hotel chain to receive the most mentions as having the poorest facilities. However, significant numbers of French and German respondents feel that the Novotel hotels offer the poorest facilities.

HOTEL CHAINS WITH THE POOREST FACILITIES

Holiday Inns	16.2%
Novotel*	10.5
Trusthouse Forte	10.5
Ramada Inns	7.6
Crest Hotels	6.7
Best Western	5.5
Hilton	4.6
Sheraton	4.4
Penta Hotels	4.0
Sofitel	3.0
Meridien Hotels	2.9
Inter-Continental	2.6
Other	21.5

*24.7% in France, 22.0% in Germany

HOTEL ROOMS FOR SMOKERS AND NON-SMOKERS

****

With consistent findings in all demographic/geographic groups, about half of the International respondents favour the idea of hotels providing rooms for smokers and non-smokers. Most others are indifferent to this concept, and relatively few actually object to it.

FEELINGS ABOUT HOTELS THAT PROVIDE ROOMS FOR SMOKERS AND NON-SMOKERS

Strongly in favour	36.3%
Somewhat in favour	14.9
Makes no difference	41.9
Somewhat opposed	2.3
Strongly opposed	4.6

****

CAR RENTAL COMPANIES

****

RENTAL CAR USAGE DURING THE PAST 2 YEARS

****

The typical 1984 international survey respondent has rented a car 11.5 times for business and 3.8 times for pleasure within the last two years. The noteworthy geographic and demographic differences in these figures generally relate to car rentals for business purposes, as indicated below.

RENTED A CAR DURING THE PAST TWO YEARS

		Country of Residence				
	Total	United Kingdom	France	Germany	Middle East	Asia
Business	11.5	10.3	17.9	15.8	9.0	6.6
Pleasure	3.8	3.0	4.4	3.8	5.1	3.2

		Class Flown				Sex	
	Total	First	Business	Economy	Discount	Male	Female
Business	11.5	12.2	13.1	10.3	8.3	11.6	5.9
Pleasure	3.8	4.6	3.5	3.6	3.9	3.8	3.3

Car rental usage has definitely increased since 1981 with reported use of major agencies up about 10 percent. Avis and Hertz still dominate the market. In addition, almost half of the 1984 respondents report having rented a car from Budget during the past two years.

RENTAL CAR AGENCIES USED DURING THE PAST TWO YEARS

	1984	1981
Avis	79.6%	71.1%
Hertz	69.8	60.4
Budget	46.7	35.0
Europcar	34.8	23.2
National	25.2	16.3
Inter Rent	14.6	11.4
Dollar	10.4	8.6
Thrifty	4.2	3.7
Tilden	2.6	--
Autohansa	1.8	2.0
American International	1.3	1.4

As a rule, the major car rental agencies show fairly equal popularity among residents of each country under consideration in this study. However, Europcar shows heightened usage among French respondents, and both Inter Rent and Autohansa have been more popular than average among German citizens.

RENTAL CAR AGENCIES USED BY 1984 INTERNATIONAL SURVEY RESPONDENTS DURING THE PAST TWO YEARS

	Total	United Kingdom	France	Germany	Middle East	Asia
Avis	79.6%	79.7%	84.6%	81.4%	77.2%	78.8%
Hertz	69.8	66.3	76.1	75.2	61.5	70.4
Budget	46.7	48.1	46.2	36.2	50.4	45.7
Europcar	34.8	40.5	(61.5)	32.2	37.1	20.4
National	25.2	19.8	21.1	18.2	22.7	33.1
Inter Rent	14.6	10.7	14.2	(45.9)	13.0	4.3
Dollar	10.4	9.9	6.5	11.4	8.0	9.4
Thrifty	4.2	3.9	4.0	4.9	3.4	6.2
Tilden	2.6	2.5	3.2	2.9	2.2	1.9
Autohansa	1.8	1.5	0.8	(11.1)	1.3	0.8
American Int'l	1.3	0.8	1.2	2.0	1.2	1.9

( ) = Far above average percent of usage.

SELECTION OF CAR RENTAL COMPANY

Regardless of geographic/demographic group, respondents generally choose their car rental company themselves when travelling for business and pleasure.

WHO SPECIFIES THE CAR RENTAL COMPANY USED FOR:

	Business	Pleasure
Self	83.7%	95.1%
Dictated by company policy	4.4	0.3
Secretary	3.6	1.2
Travel Agent	3.4	3.0
Company travel department	3.1	0.2
Business associate at destination	1.7	0.2

Overall, by far the most important factor in selection of a car rental agency is whether it has an airport location. However, for economy and discount travellers, low price is of equal importance to the on-airport location. The relative importance of all factors evaluated by respondents is as follows:

THE THREE MOST IMPORTANT FACTORS IN 1984 INTERNATIONAL SURVEY RESPONDENTS' CHOICE OF A CAR RENTAL COMPANY

On-Airport Location (1)	65.8%
Low Price (2)	44.2
Condition of cars	39.9
IAPA discount	38.4
Fast pick-up and delivery service	29.4
Types of cars available	21.8
Express check-in/check-out	20.5
Guaranteed reservations	12.9
Courteous service	11.5
Corporate rate availability	9.0
Off-airport location	2.9
Frequent renter programmes	1.2
Other	1.6

(1)

Class Flown			
First	Business	Economy	Discount
69.4	71.8	62.9	55.1

(2)

Class Flown			
First	Business	Economy	Discount
30.1	34.6	51.9	64.3

EVALUATIONS OF CAR RENTAL AGENCIES

Best Overall Service

As in prior years' International survey findings, 1984 respondents think that Avis provides the best overall service of any car rental agency. Hertz has improved its position since previous surveys.

	Agency With the Best Service Overall	Most Preferred Agency	
	1984	1981	1979
Avis	42.4%	43.7%	51.3%
Hertz	31.3	27.2	23.1
Budget	7.9	10.0	11.0
Europcar	7.5	5.5	--
National	5.0	3.6	3.3
Inter Rent	1.9	1.9	--
Dollar	0.6	1.3	0.5
American International	0.6	--	--
Tilden	0.3	--	--
Autohansa	0.3	--	--
Thrifty	0.2	--	--
Other	2.1	6.8	10.8

Among residents of Asia, Germany and France, especially the latter, Hertz rivals Avis for its reputation as the rental car agency providing the best service.

AGENCY WITH THE BEST OVERALL SERVICE,
1984 INTERNATIONAL SURVEY RESPONDENTS

	Total	United Kingdom	France	Germany	Middle East	Asia
Avis	42.4%	47.2%	34.4%	40.4%	41.7%	38.5%
Hertz	31.3	25.8	38.2	34.5	26.3	33.1
Budget	7.9	7.9	4.3	5.5	9.2	10.9
Europcar	7.5	11.3	17.2	5.1	8.4	3.6
National	5.0	2.7	3.2	1.7	5.8	7.3
Inter Rent	1.9	1.4	--	9.8	1.5	1.1
Dollar	0.6	0.7	1.1	--	--	--
American Int'l	0.6	0.1	1.1	0.9	1.0	0.7
Tilden	0.3	0.2	--	0.9	0.6	--
Autohansa	0.3	0.1	--	--	0.8	--
Thrifty	0.2	0.3	--	--	0.5	0.7
Other	2.1	2.4	0.5	1.3	4.2	4.0

Poorest Overall Service

Hertz and Budget are the agencies most frequently cited as providing the poorest service overall, and Avis is in a close third place. Hertz appears to have improved greatly relative to its 1981 position as the overwhelming first choice of agency to be avoided, and Budget has worsened somewhat in this respect.

	Agency With The Poorest Service Overall	Agency Prefer Not To Use
	1984	1981
Hertz	19.1%	41.8%
Budget	19.0	10.5
Avis	16.0	19.4
Europcar	12.5	6.4
National	9.8	4.6
Inter Rent	6.8	3.4
Dollar	6.4	3.8
Thrifty	3.4	1.6
Autohansa	1.3	--
Tilden	1.0	--
American International	0.9	--
Other	3.8	8.4

No noteworthy demographic or geographic subgroup differences emerge regarding the car rental agency with the poorest overall service.

Prices
======

Two-thirds (63.1%) of the 1984 International survey participants identify Hertz as the car rental agency with the highest prices, and an additional quarter (25.1%) think that Avis has the highest prices. These results are consistent across demographic subgroups, and only slight geographic differences arise, as shown below.

CAR RENTAL COMPANY WITH THE HIGHEST PRICES

	Total	United Kingdom	France	Germany	Middle East	Asia
Hertz	63.1%	65.3%	71.1%	61.5%	55.9%	59.9%
Avis	25.1	24.1	17.1	24.9	31.3	30.7
Europcar	4.1	4.1	3.5	1.8	5.7	2.5
Other	7.7	6.5	8.3	11.8	7.1	6.9

One-third (35.3%) of the current respondents think of Budget as the car rental company with the lowest prices, while others are divided on this issue. Again, demographic subgroups give consistent responses to this question, while some geographic differences do occur.

CAR RENTAL COMPANY WITH THE LOWEST PRICES

	Total	United Kingdom	France	Germany	Middle East	Asia
Budget	35.3%	39.0%	39.7%	35.6%	29.1%	36.3%
Europcar	11.3	14.6	23.0	9.4	14.4	8.3
Avis	10.3	9.3	6.3	11.4	10.4	9.3
National	10.0	8.8	4.8	2.7	10.2	14.0
Dollar	7.8	7.1	6.3	8.7	4.9	7.3
Thrifty	5.2	4.5	4.8	6.0	5.3	6.2
Inter Rent	5.2	3.5	4.0	10.7	7.3	1.6
Hertz	5.1	4.0	3.2	4.0	4.9	6.2
Other	9.8	9.0	7.9	11.4	13.3	10.8

RENTAL CARS FOR SMOKERS AND NON-SMOKERS

****

With highly consistent findings in the demographic/geographic subgroups, almost half (47.5%) of the 1984 respondents favour the idea of separate rental cars for smokers and non-smokers. An additional 45.9% are indifferent to this idea, and very few (6.6%) oppose it.

1984 INTERNATIONAL SURVEY RESPONDENTS' FEELINGS ABOUT COMPANIES THAT PROVIDE RENTAL CARS FOR SMOKERS AND NON-SMOKERS

Strongly in favour	33.7%
Somewhat in favour	13.8
Makes no difference	45.9
Somewhat opposed	2.1
Strongly opposed	4.5